ARCHDIOCESE OF WASHINGTON
PARISH ACCOUNTING MANUAL
PARISHSOFT FAMILY SUITE COORDINATOR ROLE DESCRIPTION

Background

ParishSOFT Family Suite is the census and contribution database for parishes in the Archdiocese of Washington. The completeness of parishioner records enables effective communication and parishioner engagement. The accuracy of parishioner contribution data enables accurate tax contribution statements. The Pastor's review of reports from Family Suite aids in understanding offertory trends and determining how to best increase offertory and other giving to the parish.

The Family Suite system plays a significant role in parish operations; therefore, the Pastor should designate an individual to be the overall Coordinator of Family Suite. The designated individual would ideally be an employee of the parish, typically either the parish bookkeeper or secretary. The Coordinator could be a contractor or volunteer, if supervised by the Pastor or his delegate.

Role Summary:

The Family Suite Coordinator reports to the Pastor and is responsible for the process of data entry to the system, ensuring the production of reporting, and supervising other system users as authorized by the Pastor.

Depending on the parish size, the weekly time commitment could be one to two hours. Creating custom reports may require additional time.

Role Specifications/Requirements:

Parish data entry actions may include:
Census
- Oversee new parishioner entry, parishioner data changes and updates
- Annual review of parishioner data, e.g., identify and resolve duplicate entries, parishioners who have moved away, etc.
- Periodic confirmation of active parishioner data, possibly during a Take the Next Step offertory increase program

Contributions
- Oversee weekly offertory data entry or electronic upload
- Batch reporting and comparison with ParishSoft Accounting, vendor reports and bank records
- New fund set up and maintenance
- Ensure separation of duties between individuals who handle cash and those who enter contributions into the system

- Ensure confidentiality agreements are signed by system users who have access to parishioner contribution records

Reporting

- Produce periodic reports for the Pastor and Finance Council. Examples include:
    - Monthly-Quarterly-Yearly Report
    - Three Year Summary
    - Contribution Query for a Custom Date Range
- Generate and prepare the Annual Parish Statistical Report and Take the Next Step report
- Produce annual contributions statements for individual contributions received in excess of $250. Reconcile with contribution statements from on-line giving software.

User administration
- Set up new users and assignment of permissions
- Assist users with in-system training and help menus
- Ensure timely removal of departed users

Skills, Knowledge and/or Abilities Required
- Work independently, manage time and meet deadlines
- Initiative to bring matters to the attention of the Pastor
- Intellectual curiosity around data activity and trends
- Interest to explore computer system menus and functions
- Problem solve issues within the Family Suite donor database and/or reporting

Other
Participate in ParishSOFT vendor and Archdiocese meetings regarding system training and updates.
Learn updates and changes and inform other parish users as needed.